1338978

FORM D

UNITED STATES SECURITIES AND EXCHANGE COMMISSION Washington, D.C. 20549

FORM D

NOTICE OF SALE OF SECURITIES PURSUANT TO REGULATION D, SECTION 4(6), AND/OR AUNIFORM LIMITED OFFERING EXEMPTION

OMB Number: 3235-0076 Expires: May 31, 2005 Estimated average burden hours per response.

SEC USE ONLY								
Prefix	Serial							
DATE	RECEIVED							

Name of Offering (check if this is an amendment and name has changed, and indicate change.)	
Private Placement of up to \$150,000,000* in Limited Partnership Interests.	
Filing Under (Check box(es) that apply):	Section 4(6) 3FCFWULORS
Type of Filing: New Filing Amendment	
A. BASIC IDENTIFICATION DATA	SEP 1 4 2005
1. Enter the information requested about the issuer	(35
Name of Issuer (check if this is an amendment and name has changed, and indicate change.)	Myon S
Caltius Equity Partners II, LP	198
Address of Executive Offices (Number and Street, City, State, Zip Code)	Telephone Number (Including Area Code)
11766 Wilshire Boulevard, Suite 850, Los Angeles, CA 90025	(310) 996-9585
Address of Principal Business Operations (Number and Street, City, State, Zip Code)	Telephone Number (Including Area Code)
(if different from Executive Offices)	
Brief Description of Business	
Private equity investment fund formed for making investments in debt and equity sec	curities of companies.
Type of Business Organization	
corporation limited partnership, already formed	other (please specify 05066175
business trust limited partnership, to be formed	
Month Year	
Actual or Estimated Date of Incorporation or Organization: 0 8 0 5	
Jurisdiction of Incorporation or Organization: (Enter two-letter U.S. Postal Service abbreviation fo	r State:
CN for Canada: FN for other foreign jurisdiction)	DE

GENERAL INSTRUCTIONS

Who Must File: All issuers making an offering of securities in reliance on an exemption under Regulation D or Section 4(6), 17 CFR 230.501 et seq. or 15 U.S.C. 77d(6).

When to File: A notice must be filed no later than 15 days after the first sale of securities in the offering. A notice is deemed filed with the U.S. Securities and Exchange Commission (SEC) on the earlier of the date it is received by the SEC at the address given below or, if received at that address after the date on which it is due, on the date it was mailed by United States registered or certified mail to that address.

Where to File: U.S. Securities and Exchange Commission, 450 Fifth Street, N.W., Washington, D.C. 20549

Copies Required: Five (5) copies of this notice must be filed with the SEC, one of which must be manually signed. Any copies not manually signed must be photocopies of the manually signed copy or bear typed or printed signatures.

Information Required: A new filing must contain all information requested. Amendments need only report the name of the issuer and offering, any changes thereto, the information requested in Part C, and any material changes from the information previously supplied in Parts A and B. Part E and the Appendix need not be filed with the SEC.

Filing Fee: There is no federal filing fee.

This notice shall be used to indicate reliance on the Uniform Limited Offering Exemption (ULOE) for sales of securities in those states that have adopted ULOE and that have adopted this form. Issuers relying on ULOE must file a separate notice with the Securities Administrator in each state where sales are to be, or have been made. If a state requires the payment of a fee as a precondition to the claim for the exemption, a fee in the proper amount shall accompany this form. This notice shall be filed in the appropriate states in accordance with state law. The Appendix to the notice constitutes a part of this notice and must be completed.

ATTENTION-

Failure to file notice in the appropriate states will not result in a loss of the federal exemption. Conversely, failure to file the appropriate federal notice will not result in a loss of an available state exemption unless such exemption is predicated on the filing of a federal notice.

SEC 1972 (6-02)

Persons who respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB control number.

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A. BASIC IDENTIFICATION DATA										
2. Enter the information requested for the following:										
• Each promoter of the issuer, if the issuer has been organized within the past five years;										
• Each beneficial owner having the power to vote or dispose, or direct the vote or disposition of, 10% or more of a class of equity securities of the issuer;										
• Each executive officer	• Each executive officer and director of corporate issuers and of corporate general and managing partners of partnership issuers; and									
 Each general and mana 	ging partner of partne	ership issuers.								
Cheek Box(es) that Apply:	☐ Promoter	☐ Beneficial Owner	☐ Executive Officer	Director	☐ General and/or Managing Partner					
Full Name (Last name first, if	individual)	_	The state of the s							
CEP II, LP (General	Partner of Caltiu	is Equity Partners II, I	LP)							
Business or Residence Address (Number and Street, City, State, Zip Code)										
11766 Wilshire Boulevard, Suite 850, Los Angeles, CA 90025										
Check Box(es) that Apply:	Promoter	☐ Beneficial Owner	Executive Officer	Director	☐ General and/or ☐ Managing Partner					
Full Name (Last name first, if	individual)									
		LLC (General Partne	er of CEP IL LP)							
Business or Residence Addres		<u> </u>								
		, Los Angeles, CA 90	025							
Check Box(es) that Apply:	Promoter	☐ Beneficial Owner	☐ Executive Officer	☐ Director	General and/or Managing Partner					
Full Name (Last name first, if	individual)			*****	3/10-m ²					
Upchurch, James B.	(Managing Mem	ber of Caltius Equity	Partners Management,	LLC)						
Business or Residence Addres										
11766 Wilshire Boul	evard, Suite 850	, Los Angeles, CA 90	025							
Check Box(es) that Apply:	Promoter	☐ Beneficial Owner	☐ Executive Officer	Director	☐ General and/or Managing Partner					
Full Name (Last name first, if	individual)									
Ahn, Garrick (Manag	ging Director of	Caltius Equity Partner	rs Management, LLC)							
Business or Residence Addres	s (Number and Street	t, City, State, Zip Code)								
11766 Wilshire Boul	evard, Suite 850	, Los Angeles, CA 90	025							
Check Box(es) that Apply:	Promoter	Beneficial Owner	☑ Executive Officer	Director	☐ General and/or Managing Partner					
Full Name (Last name first, if	individual)									
Morgan, Michael (M	anaging Director	r of Caltius Equity Pa	rtners Management, LI	LC)						
Business or Residence Address	(Number and Street	t, City, State, Zip Code)								
11766 Wilshire Boul	evard, Suite 850	, Los Angeles, CA 90	025							
Check Box(es) that Apply:	☐ Promoter	Beneficial Owner	☐ Executive Officer	☐ Director	☐ General and/or Managing Partner					
Full Name (Last name first, if	individual)									
Business or Residence Address	(Number and Street	, City, State, Zip Code)								
Check Box(es) that Apply:	Promoter	☐ Beneficial Owner	Executive Officer	Director	General and/or Managing Partner					
Full Name (Last name first, if	individual)			<u> </u>						
			•							
Business or Residence Address (Number and Street, City, State, Zip Code)										

				В.	INFORMA	ATION AB	OUT OFFE	RING				
											Yes	No
1. Has	the issuer s	old, or doe	s the issue	r intend to	sell, to nor	-accredite	d investors	in this offe	ring?		🗆	\boxtimes
			A	ınswer also	in Append	dix, Colum	n 2, if filin	g under UI	LOE.			
2. Wha	t is the mir	imum inve	estment tha	it will be ac	ccepted fro	m any indi	vidual?				\$5,000,000*	
										Yes	No	
3. Does the offering permit joint ownership of a single unit?												
4. Enter the information requested for each person who has been or will be paid or given, directly or indirectly, any commission or similar remuneration for solicitation of purchasers in connection with sales of securities in the offering. If a person to be listed is an associated person or agent of a broker or dealer registered with the SEC and/or with a state or states, list the name of the broker or dealer. If more than five (5) persons to be listed are associated persons of such a broker or dealer, you may set forth the information for that broker or dealer only.												
Full Na	me (Last n	ame first, i	f individua	1)								
Busines	s or Reside	ence Addre	ss (Numbe	r and Stree	et, City, Sta	ite, Zip Co	de)					
Name o	f Associate	ed Broker o	or Dealer	***************************************								
					ends to Sol							l States
[AL]	[AK]	[AZ]	[AR]	[CA]	[CO]	[CT]	[DE]	[DC]	[FL]	[GA]	[HI]	[ID]
[IL]	[IN]	[IA]	[KS]	[KY]	[LA]	[ME]	[MD]	[MA]	[MI]	[MN]	[MS]	[MO]
[MT]	[NE]	[NV]	[NH]	[NJ]	[NM]	[NY]	[NC]	[ND]	[OH]	[OK]	[OR]	[PA]
[RI] 	[SC]	[SD]	[TN]	[TX]	[UT]	[VT]	[VA]	[WA]	[WV]	[W1] 	[WY]	[PR]
Full Na	me (Ļast n	ame first, i	f individua	1)								
Busines	s or Reside	ence Addre	ss (Numbe	r and Stree	t, City, Sta	te, Zip Co	de)					
Name o	f Associate	d Broker o	or Dealer									
					ends to Sol							1 64-4
												1 States
[AL] [IL]	[AK] [IN]	[AZ] [IA]	[AR] [KS]	[CA] [KY]	[CO] [LA]	[CT] [ME]	[DE] [MD]	[DC] [MA]	[FL] [Ml]	[GA] [MN]	[HI] [MS]	[ID] [MO]
[MT]	[NE]	[NV]	[NH]	[NJ]	[NM]	[NY]	[NC]	[ND]	[OH]	[OK]	[OR]	[PA]
[RI]	[sc]	[SD]	[TN]	[TX]	[UT]	[VT]	[VA]	[WA]	[wv]	[WI]	[WY]	[PR]
Full Na	me (Last na	ame first, i	f individua	1)								
Busines	s or Reside	ence Addre	ss (Numbe	r and Stree	t, City, Sta	te, Zip Coo	de)				:	
Name o	f Associate	d Broker o	or Dealer									
					ends to Sol							1 States
•												l States
[AL] [IL]	[AK] [IN]	[AZ] [IA]	[AR] [KS]	[CA] [KY]	[CO] [LA]	[CT] [ME]	[DE] [MD]	[DC] [MA]	[FL] [MI]	[GA] [MN]	[HI] [MS]	[ID] [MO]
[MT]	[NE]	[NV]	[NH]	[NJ]	[NM]	[NY]	[NC]	[ND]	[OH]	[OK]	[OR]	[PA]
[RI]	[SC]	[SD]	[TN]	[TX]	[UT]	[VT]	[VA]	[WA]	[WV]	[WI]	[WY]	[PR]

 $^{{\}bf *The\ General\ Partner\ reserves\ the\ right\ to\ accept\ smaller\ participations.}$

	C. OFFERING PRICE, NUMBER OF INVESTORS, EXPENSES AND USE O	F PROCEED:	\$	
l.	Enter the aggregate offering price of securities included in this offering and the total amount already sold. Enter "0" if answer is "none" or "zero." If the transaction is an exchange offering, check this box and indicate in the columns below the amounts of the securities offered for exchange and already exchanged			
	Type of Security	Aggregate Offering Pr		Amount Already Sold
	, Debt.'	\$0		\$0
	Equity	\$0		\$0
	☐ Common ☐ Preferred			
	Convertible Securities (including warrants)	\$0		\$0
	Partnership Interests	\$150,000,000	*	\$0
	Other (Specify N/A)	\$0		\$0
	Total	\$150,000,000	*	\$0
	Answer also in Appendix, Column 3, if filing under ULOE.			
	Enter the number of accredited and non-accredited investors who have purchased securities in this offering and the aggregate dollar amounts of their purchases. For offerings under Rule 504, indicate the number of persons who have purchased securities and the aggregate dollar amount of their purchases on the total lines. Enter "0" if answer is "none" or "zero."			Aggregate
		Number Investors		Dollar Amount of Purchases
	Accredited Investors	0		\$0
	Non-accredited Investors.	N/A		\$N/A
	Total (for filings under Rule 504 only)	N/A		\$N/A
	Answer also in Appendix, Column 4, if filing under ULOE.			
	If this filing is for an offering under Rule 504 or 505, enter the information requested for all securities sold by the issuer, to date, in offerings of the types indicated in the twelve (12) months prior to the first sale of securities in this offering. Classify securities by type listed in Part C – Question 1.			
	Type of Offering	Type of Security		Dollar Amount Sold
	Rule 505	Security		\$
	Regulation A			\$
	Rule 504			\$
	Total			\$
			—	4
. а	s. Furnish a statement of all expenses in connection with the issuance and distribution of the securities in this offering. Exclude amounts relating solely to organization expenses of the issuer. The information may be given as subject to future contingencies. If the amount of an expenditure is not known, furnish an estimate and check the box to the left of the estimate.			
	Transfer Agent's Fees		\boxtimes	\$0
	Printing and Engraving Costs		\boxtimes	\$50,000
	Legal Fees		\boxtimes	\$600,000
	Accounting Fees		\boxtimes	\$50,000
	Engineering Fees		\boxtimes	\$0
	Sales Commission (specify finders' fees separately)			\$0
	Other Expenses (identify) Miscellaneous (e.g., travel, general fund raising expenses, and po	ostage)	\boxtimes	\$50,000
	Total		\boxtimes	\$750,000

 $^{{}^{\}star} The \ General \ Partner \ reserves \ the \ right \ to \ offer \ a \ greater \ amount \ of \ limited \ partnership \ interests.$

	C. OFFERING PRICE	E, NUMBER OF INVESTORS, EXPENSES AND USE	OF	PROCEEDS		
b.	and total expenses furnished in response	ate offering price given in response to Part C – Que to Part C – Question 4.a. This difference is the "ad	juste	:d	\$14	19,250,000
5.	Indicate below the amount of the adjuste each of the purposes shown. If the amou check the box to the left of the estimate. gross proceeds to the issuer set forth in respectively.					
				Payments to Officers, Directors & Affiliates		Payments To Others
	Salaries and fees		×	\$20,250,000*	_ 🛛	\$0
	Purchase of real estate		×	\$0	_ 🛭	\$0
	Purchase, rental or leasing and install	lation of machinery and equipment	×	\$0	_ 🛭	\$0
	Construction or leasing of plant build	lings and facilities	×	\$0	_ ⊠	\$0
	offering that may be used in exchang	uding the value of securities involved in this ge for the assets or securities of another issuer	⊠	\$0	_ 🛭	\$127,500,000
	Repayment of indebtedness		×	\$0	_ 🛛	\$0
	Working capital		Ø	\$0		\$1,500,000
	Other (specify):		Ø	\$0	_ \	\$0
				\$		\$
	Column Totals		×	\$20,250,000	_ 🛛	\$129,000,000
	Total Payments Listed (column total	s added)		⊠ <u>\$</u>	149,250	,000
		D. FEDERAL SIGNATURE				
ollo	wing signature constitutes an undertakin	gned by the undersigned duly authorized person. I g by the issuer to furnish to the U.S. Securities and by the issuer to any non-accredited investor pursual	Exc	hange Commis	sion, up	on written
ssu	er (Print or Type)	Signature		Date		
Calt	ius Equity Partners II, LP	Alale		September 9	2005 ر	
Van	ne of Signer (Print or Type)	Title of Signer (Print or Type)				
am	es B. Upchurch	Managing Member of Caltius Equity Partners Ma II, LP, general partner of issuer	nage	ement, LLC, ge	neral pa	artner of CEP

-ATTENTION-

Intentional misstatements or omissions of fact constitute federal criminal violations. (See 18 U.S.C. 1001.)

^{*}Estimated aggregate amount for first six years, and the Partnership will continue to pay management fees thereafter.

E. STATE SIGNATURE									
Is any party described in 17 CFR 230.262 of such rule?		Yes	No						
See Appendix, Column 5, for state response.									
2. The undersigned issuer hereby undertakes to furnish to any state administrator of any state in which this notice is filed, a notice on Form D (17 CFR 239.500) at such times as required by state law.									
3. The undersigned issuer hereby undertak- issuer to offerees.	3. The undersigned issuer hereby undertakes to furnish to the state administrators, upon written request, information furnished by the issuer to offerees.								
4. The undersigned issuer represents that the issuer is familiar with the conditions that must be satisfied to be entitled to the Uniform Limited Offering Exemption (ULOE) of the state in which this notice is filed and understands that the issuer claiming the availability of this exemption has the burden of establishing that these conditions have been satisfied.									
The issuer has read this notification and knows the contents to be true and has duly caused this notice to be signed on its behalf by the undersigned duly authorized person.									
Issuer (Print or Type)	Signature	Date							
Caltius Equity Partners II, LP September 9, 200									
Name (Print or Type)	Title (Print of Type)								
James B. Upcurch Managing Member of Caltius Equity Partners Management, LLC, general partner of CEP II, LP, general partner of issuer									

Instruction

Print the name and title of the signing representative under his signature for the state portion of this form. One copy of every notice on Form D must be manually signed. Any copies not manually signed must be photocopies of the manually signed copy or bear typed or printed signatures.

APPENDIX

	2 3 4							5	
	Intend to non-a investors	to sell ccredited s in State -Item 1)	Type of security and aggregate offering price offered in state (Part C-Item 1)	Type of investor and amount purchased in State (Part C-Item 2)				Disqualification under State ULOE (if yes, attach explanation of waiver granted) (Part E-Item 1)	
1				Number of Accredited		Number of Non-Accredited			
State	Yes	No		Investors	Amount	Investors	Amount	Yes	No
AL		☒	*	0	0	0	0		⊠
AK		Ø	*	0	0	0	0		×
AZ		⊠	*	0	0	0	0		⊠
AR			*	0	0	0	0		⊠
CA		\boxtimes	*	0	0	0	0		⊠
СО		Ø	*	0	0	0	0		Ø
СТ		×	*	0	0	. 0	0		×
DE		Ø	*	0 -	0	0	0		⊠
DC		Ø	*	0	0	0	0		Ø
FL		\boxtimes	*	0	0	0	0		
GA		×	*	0	0	0 .	0		⊠
НІ		×	*	0	0	0	0		Ø
ID ·		⊠	*	0	0	0	0		Ø
IL		⊠	*	0	0	0	0		
IN		☒	*	0	0	0	0		☒
IA		Ø	. *	0	0	0	0		☒
KS		⊠	*	0	0	. 0	0		Ø
KY		⊠	*	0	0	0	0		☒
LA		⊠	*	0	0	0	0		×
ME		Ø	*	0	0	0	0		×
MD		⊠	*	0	0	0	0		×
MA		Ø	*	0	0	0	0		
MI		Ø	*	0	0	0	0		Ø
MN		Ø	*	0	0	0	0		⊠
MS		Ø	*	0	0	0	0		
МО		☒	*	0	0	0	0		⊠
MT		⊠	*	0	0	0	0		×
NE		☒	*	0	0	0	0		×

APPENDIX 2 3 1 5 Disqualification under State ULOE Type of security Intend to sell and aggregate (if yes, attach to non-accredited offering price Type of investor and explanation of investors in State offered in state amount purchased in State waiver granted) (Part C-Item 1) (Part-B-Item 1) (Part C-Item 2) (Part E-Item 1) Number of Number of Accredited Non-Accredited Amount State Yes No Investors Amount Investors Yes No \boxtimes * 0 □ · \boxtimes NV \boxtimes 0 0 0 0 \boxtimes NH * \boxtimes 0 0 0 0 NJ \boxtimes 0 0 \boxtimes 0 0 \boxtimes NM \boxtimes 0 0 0 0 NY \boxtimes 0 0 0 \boxtimes 0 \boxtimes NC 0 ND \boxtimes 0 0 0 \boxtimes \boxtimes 0 0 0 0 \boxtimes OH OK \boxtimes 0 0 0 0 Ø \boxtimes 0 0 0 0 \boxtimes OR PΑ \boxtimes 0 0 0 0 \boxtimes \boxtimes 0 \boxtimes RI 0 0 0 \boxtimes 0 0 0 0 \boxtimes SC \boxtimes 0 \boxtimes 0 0 0 SD TN \boxtimes * 0 0 0 0 \boxtimes TX \boxtimes * 0 0 0 0 \boxtimes \boxtimes * 0 0 0 0 \boxtimes UT \boxtimes * 0 0 0 0 \boxtimes VT \boxtimes * 0 0 0 0 \boxtimes VA \boxtimes 0 0 0 0 \boxtimes WA \boxtimes * 0 \boxtimes WV 0 0 0 \boxtimes \boxtimes 0 0 0 0 WI \boxtimes WY 0 0 0 0 \boxtimes \boxtimes PR 0 0 0 0 \boxtimes

^{*}Up to \$150,000,000 in limited partnership interests.